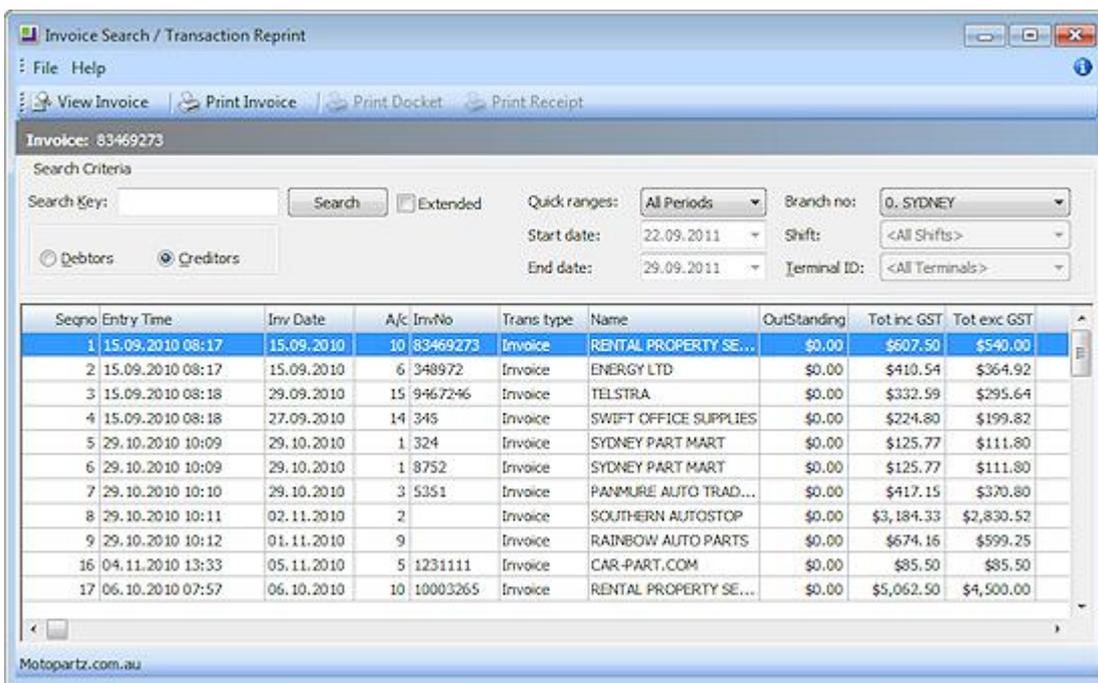


Invoice Number Search

Creditor/Debtor account > Transactions tab > 

Clicking the Invoice Search button on the Transactions tab () or pressing F7 opens the Invoice Search window.

The Invoice Search window has a right click menu to giving access to many other windows. This includes ‘drilling’ to the Account (Debtors or Creditors) where further transactions, reversals or updating of header reference fields may be performed from the transactions tab (if you have sufficient access rights within those windows).



From here you can reprint invoices, credits and receipts. Set search criteria and click **Search**. The **Print** buttons are not enabled until you have selected a search item.

The filters to search by Shift and Terminal ID are disabled when the window is set to Creditors mode as they are not applicable.

Field Definitions

The grid (see page 10) header fields are detailed in the table below:

Field	Description
Seqno	A unique identifier for records in tables.
Entry Time	The time of the invoice entry.
Inv Date	The date of the invoice entry.
A/c	The account number.
InvNo	The invoice number.
Trans type	The transaction type, i.e. Invoice or credit note etc.

Name	The company name of the debtor or creditor.
OutStanding	Any outstanding amounts for this invoice are listed here.
Tot inc GST	The total amount that was invoiced, including GST.
Tot exc GST	The total amount that was invoiced, excluding GST.
Taxtotal	The total amount that was taxed to this invoice.
Alpha Code	This is the debtor/creditor code which is normally automatically assigned by the system. Generally this is the first 6 characters of the account name followed by two sequential numerals, starting at 01.
Session_id	<p>A session id is an integer value (number) which tags all transactions at the time of saving. It's transaction scoped, so when you create an invoice which has invoice line and optional payments, all those transactions get grouped together with the same session id.</p> <p>It's a grouping type of field, i.e. this field gets moved / copied when the source transaction moves through the system. The invoice lines will receive a session_id when saved. The invoice lines required the stock to be decremented, resulting in the creation of a stock transaction, this copies the invoice line session id and then the stock and invoices are posted to the GL. This creates a GL transaction and once again the invoice line session id gets copied. It's primarily used to ensure that once a source transaction is posted to the GL all its source transactions can be easily identified.</p>
Gatewayno	This configures EFTPOS / Credit card payment gateway numbers. In MYOB EXO Business you can set up Credit card payment gateways . Like a direct payment service, a web service for the management and handling of payments. As EXO Business can handle multiple payments, it tags the payment debtors lines with the seqno identifying the gateway used.
Eftauth	This usually contains EFTPOS / Credit Card authorisation / approval codes related to payment gateways.
Eftcaid	This usually contains a unique EFTPOS computer / terminal id . See POS / EFTPOS whitepaper.
Eftstan	This usually contains a unique EFTPOS / Credit Card transactional id. See POS / EFTPOS whitepaper
Job#	Usually a jobcost jobno / jobcode if an invoice came as a result of an EXO Job Costing job.

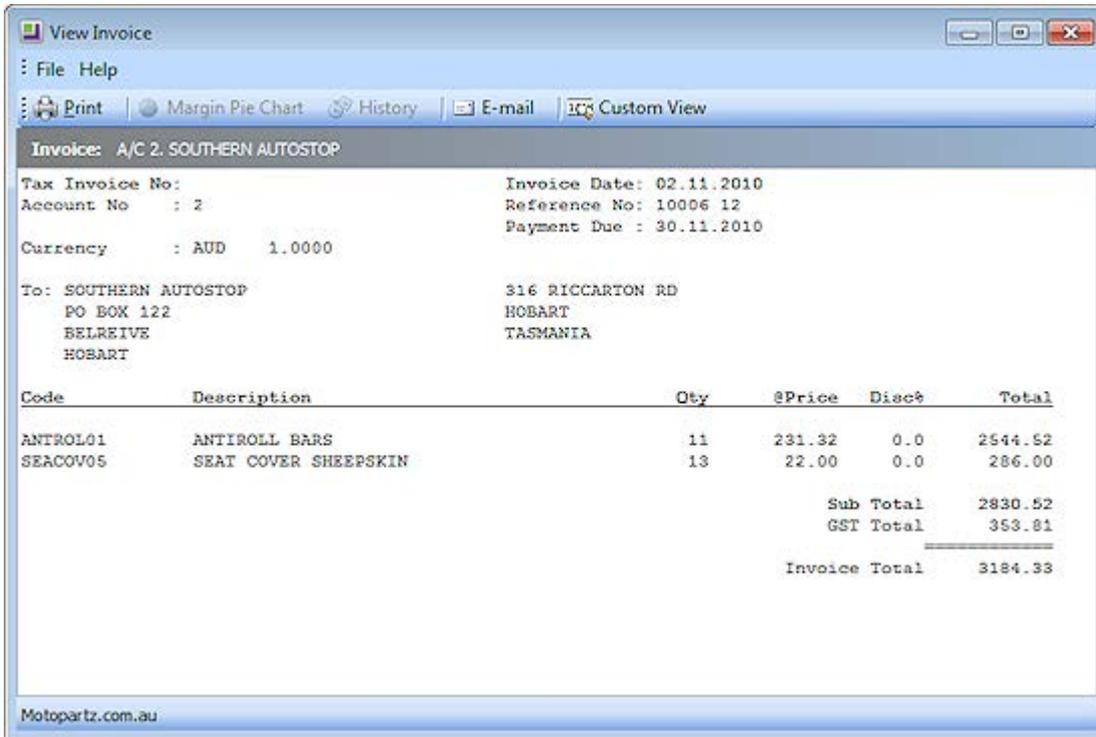
Toolbar



Print Invoice



Print Docket



View Invoice

Recording Additional Information through Extra Fields

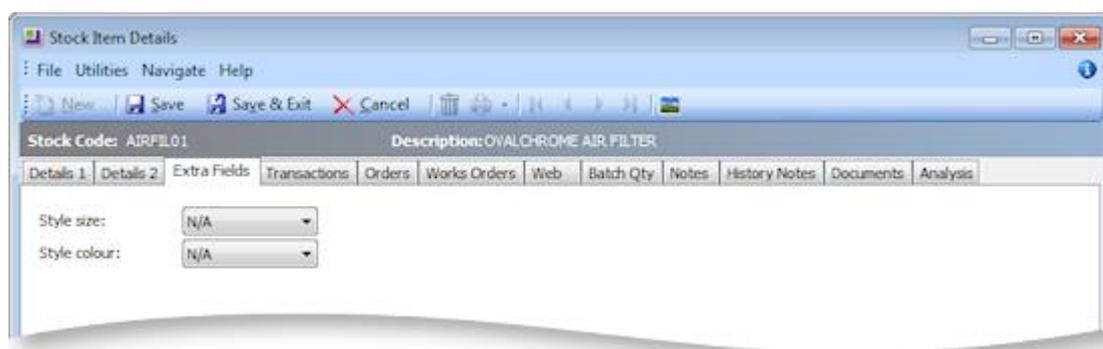
If you have any specific information on an account or stock item that cannot be displayed elsewhere, you can set up extra fields (see page 23) to display on the account's Extra Fields tab.

Note: This tab is available only if you have set up extra fields and displays the fields that you have established.

Debtor and Creditor accounts support 24 extra fields; the first three extra fields are displayed in the Details1 tab of the Debtor/Creditor account, and the remainder on the Extra Fields tab. For Stock items, all extra fields are displayed on the Extra Fields tab.

To record extra field details:

1. Click the **Extra Fields** tab.



2. Complete any necessary fields on this tab.

Debtor/Creditor Account Serial Numbers

Account > Debtors/Creditors > {Double Click the Account name} > (Serials)

The Serials tab on Debtor and Creditor accounts is used to record all serialised stock items (see page 199) sold to the Debtor/Creditor. This enables you to quickly handle Debtor enquiries about stock items they have purchased, for warranty, and return policy purposes.

Note: Before serial numbers can be used, they must be activated for the database by setting the profile **Serial Numbers Tracking Enabled**. Serial numbers may only be used with stocked items. Lookup items cannot be serialised.

Serial Number Types (Modes)

Occurrence of serial number processing depends on both the serial type (mode) of the stock item, and the class of the trading partner in the particular MYOB EXO Business function.

There are three classes of trading partners:

- Creditor (Supplier) – e.g. functions like purchase orders and creditor invoices.
- Internal (no Creditor or Debtor) – e.g. adjustments, transfers and works orders.
- Debtors (Customer) – e.g. sales orders and debtor invoices.

You can search for a serial number across all branches:

1. Click on the **Serials tab** of the debtor/creditor account.
2. Enter the serial number you are searching for, or leave blank to view all serialised stock items sold to this debtor.
3. Check the **Exclude not in stock** checkbox to exclude.
4. Check the **Exclude pre-assigned** checkbox.

Search Filters

Option	Description
Serial Number	Serial numbers are maintained as part of the workflow whenever stock transactions are created for a serialised stock item. This is usually associated with a business document (e.g. Debtor invoice). When the document is saved using the Save & Exit or Save buttons, the stock items that should be serialised are determined based on the combination of the document class and the serial type of the stock items. The quantity of serials for each of these is computed.
Location	Choose the location from the list to filter this search.
Exclude not in stock	Tick this to filter out serial number results in the search that are not in stock.
Exclude preassigned	Tick this to filter out serial number results in the search that have been pre-assigned.

Serialised Item Details

The grid (see page 10) header fields are detailed in the table below:

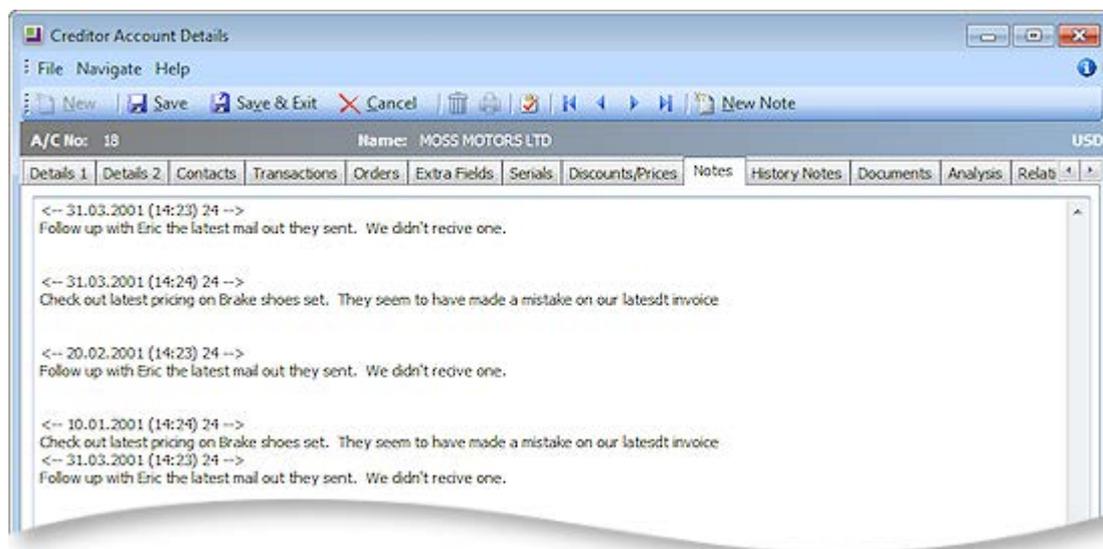
Column	Description
Stock Code	The Stock item code.
Description	The description of the stock item.
Serial No	The serial number of the stock item.
Location	The location from which the serialized stock item was purchased.
Assigned Document	If no documents are assigned the default will be none. If there are there will be a link to this document.
CR Accno	The creditor account number
Reference	If applicable a reference number will be listed here.
BOM Code	Bill of materials code
Worksorder No	The works order number. This number is allocated by the system.
RequestSeqno	Joins stock requests
Job No	The job number.
InStock	Provide indication if this serial number available for sale.
Last Updated	The date that the details on this stock item where last updated.

Recording Notes

Notes are a freeform way of recording any communication or general information related to a selected account master. Notes can be added to Debtor, Creditor, Stock and General Ledger accounts. The username and current date are automatically entered at the start of a new note. Notes are displayed in a list you can scroll through.

To record notes for an account:

1. Go to the Notes tab on the Account Details window:



2. Click the **New Note** button () to enter a new note. The current system date is automatically inserted with the note.
3. Right click anywhere in the editing area to open a popup menu. Most of these are standard editing commands with the addition of **Insert Username**, to insert your name at the end of the note and **Insert Common Phrase**, see the tip below.
4. After entering the contents of the note, click the Save button to save the note entry.

Tip: Use the **Common Phrases utility (see page 139)** when entering repetitive information, or to save typing and assist with retaining a generic format to notes.

History Notes

History notes are more structured and formal than Notes (see page 137). You can search for history notes, delete them, and email them. Generally use history notes for more formal communications with the debtor/creditor, that you want to keep a record of.

A History Notes tab is available on the Debtors, Creditors, Non Accounts, Stock and General Ledger accounts windows. The following table describes the available buttons and fields on this tab:

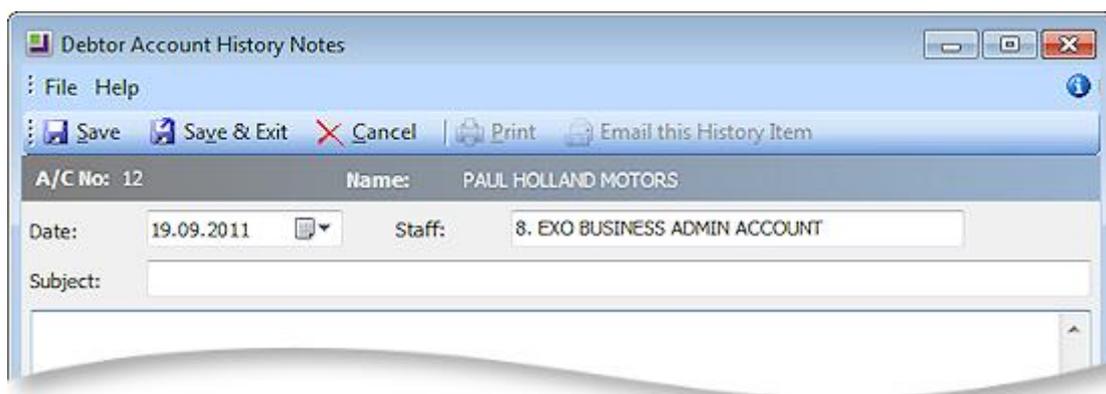
Field/Button	Description
New History Item button	Used to create a new history item. This opens the New or Edit window.
Delete History Item button	Used to delete an existing history item.
Source	What sort of account the history note was created from.

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Date	The date this history item was created. Defaults to the current date but can be changed.
Subject	The subject of the history note.
Staff	The staff member who is creating this note. Defaults to the currently logged in user, but you can enter another staff member in this field, or use the question mark search facility to search for another staff member.

History Notes Window Fields

To create a new history note, click the **New History Item** button () on the account window toolbar.



The following table describes the fields in the History Notes window:

Field	Description
Date	The date this history note was created. Defaults to the current date but can be changed.
Staff	The staff member who is creating this note. Defaults to the currently logged in user, but you can enter another staff member in this field, or use the question mark search facility to search for another staff member.
Subject	Enter the subject of the history note.
(Body)	Enter the content of the history note into the main text entry field on this window.
Email this History Item	Use this button to email this history note (see page 139).

Editing the History Note

1. From the History Notes tab, click **New History Note** () to enter a new note. The current system date is automatically inserted into the note. This date can be changed from the drop-down list.
2. Right-click anywhere in the editing area to open a popup menu. Most of these are standard editing commands with the addition of **Insert Username**, to insert your name at the end of the note and **Insert Common Phrase**, see the tip below. There is also **Spell Check** feature for history notes.

Note: If the **Spell Check** option is not available, you may need to install the spellchecker DLL files and register them manually. Contact Support for the required files and instructions on how to install them.

3. After entering the contents of the note, click **Save** to save the note entry.

TIP: For entering repetitive information and to save typing and assist with retaining a generic format to notes, use the **Common Phrases utility (see page 139)**.

Saving and/or Emailing this History Note Item

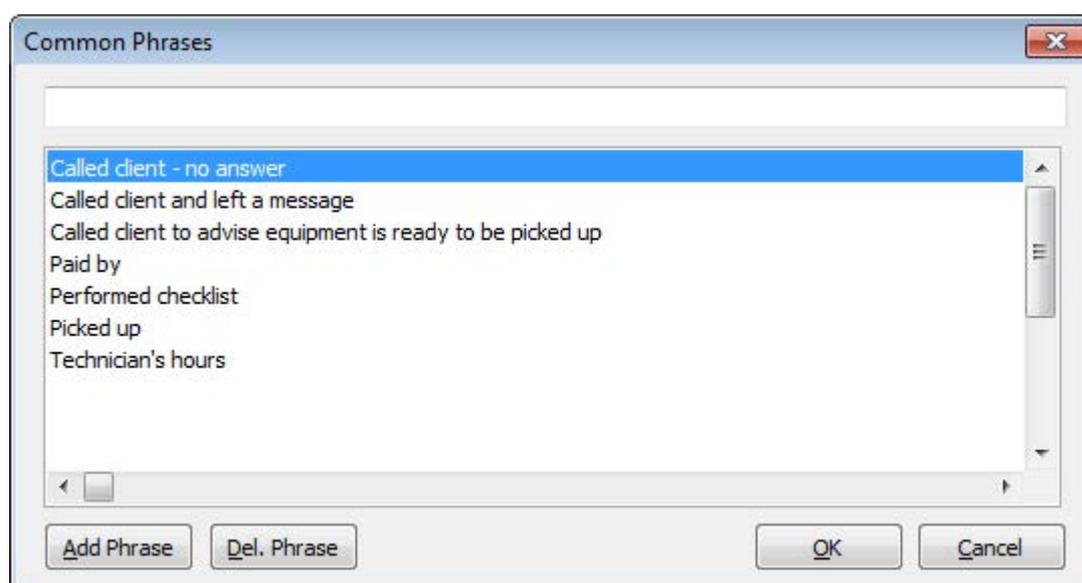
1. Review the history note, make any changes if required, and then click **Save**. This is then recorded in the History Notes tab. Only after saving the note will the Print and Email this history item buttons become available. If you choose to Email this note, an email is automatically created with the following pre-populated information:
 - By default the addressee of the email is the current Debtor/Creditor, using the email address recorded on the Details 1 tab.
 - The subject of the email is the **Subject** of the history note.
 - The content of the email is the body of the history note.
2. If necessary, make any changes to the email and send.

Common Phrases

A library of common phrases can be built to save typing and assist with retaining a generic format to notes.

To select or create a common phrase:

In a supported field, press CTRL + ' (single quote). The Common Phrases window appears:



To add a phrase, type the phrase and click the **Add Phrase** button.

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To select a common phrase to the text box, begin typing the phrase and the cursor will focus on the nearest match in the search grid. Either click **OK** to select the highlighted phrase, or double-click the phrase required.

To delete a phrase from the list, highlight the phrase to be deleted and click the **Del. Phrase** button.

Managing / Creating Documents

The Documents tab lists all the documents related to an Opportunity or a Debtor, Creditor or Stock account. The Document Manager, which adds, edits and removes documents from accounts, its standard functionality throughout MYOB EXO Business, such as in the GL, Creditors and Stock modules.

It may be useful for your business to maintain copies of documents that you send each Creditor/Debtor.

Any file that is recognized by Windows, including spreadsheets, documents, and graphics, can be attached to the account. Any email sent from MYOB EXO Business is automatically attached to the relevant account. You can either store documents as attachments, or in the EXO Business database. You can export a document stored in the EXO Business database back to a standalone file.

The template is a fixed format, once imported, the document is stored inside the database. It is backed up when you back up your database. If you import many large documents, the size of your database is substantially increased.

Note: If you transport the database frequently, the use of this feature should be minimal. It is recommended that you do not store large documents here.

To create documents for the Creditor, click the Documents tab in the account masters window.

Field Definitions

The grid header fields are detailed in the table below:

Field	Description
Doc. Date	The date the document was attached to the account.
Reference	Any internal reference text for the document.
Doc. Code	Any internal document code for the document.
Description	A description of the attachment, entered by the person who attached the file.
File Name	The filename of the attached file.
Linked	Whether or not the attached file is stored in the MYOB EXO Business database, or linked to EXO Business but stored separately on your computer or network.

Menu Commands

All the commands for document management are from the toolbar, detailed below:



1. **Run Document Manager** to add, edit and delete documents. Launches the Document Manager (see page 525).
2. Create and edit an RTF merge letter. (see page 531) Create a merge letter to this Debtor/Creditor using one of your preset Clarity letter templates.
3. **Delete** the selected document. Delete the attached file highlighted in the grid.
4. Merge account data against a template (see page 532) to produce form letter.
5. Export a document to another location (see page 526).
6. Import an existing document into this page (see page 526).

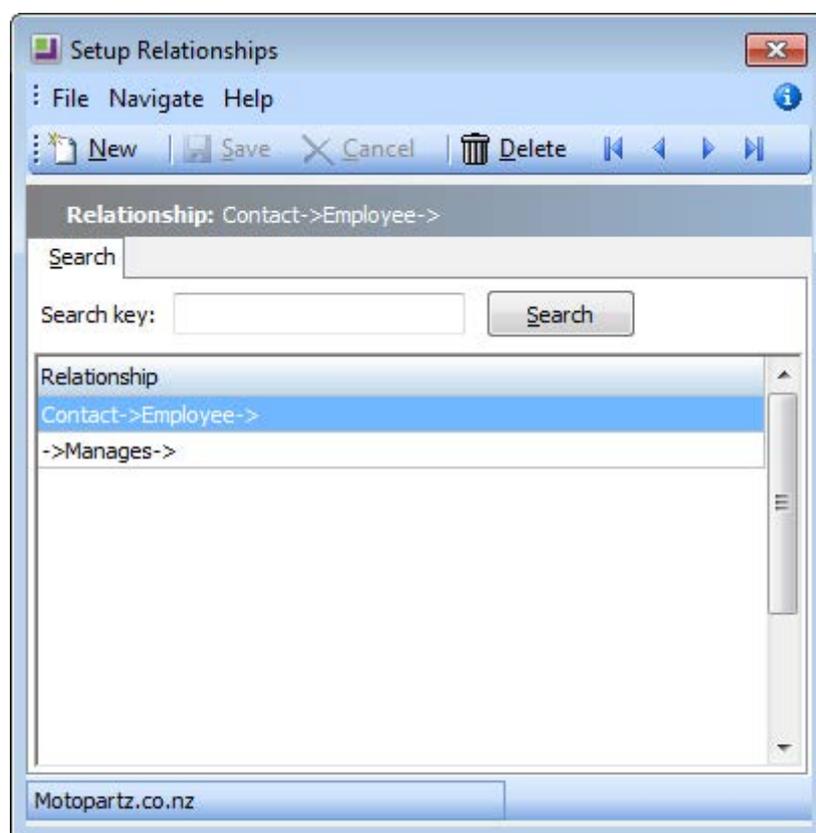
Relationships

Relationships can be formed between Contacts, Debtors, Creditors and Non Accounts. New relationship types can be defined to link any of the entities of Debtors, Creditors, Non Accounts, Contacts, and staff.

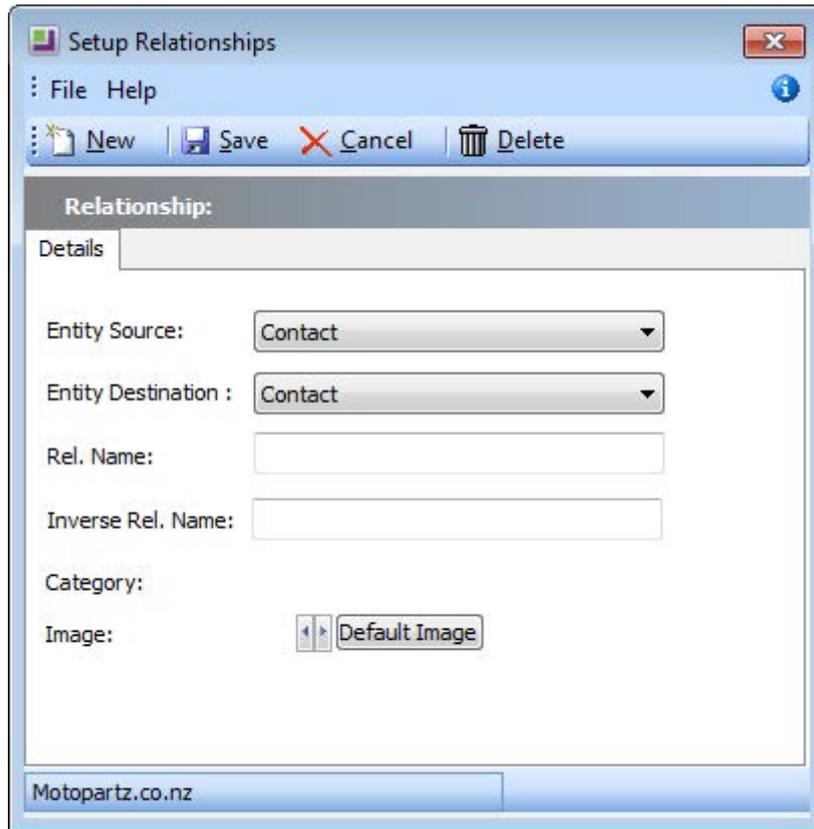
Creating New Relationship Types

Some relationship types will have been predefined for you; however you are likely to want to create relationship types of your own. To do this, right click on any area of the relationship tree and select Setup Relationships.

The Setup Relationships window opens:



Double-click on an existing relationship type to edit it, or click **New** to define a new type.



Note: Except for the **Image**, you cannot edit the details for a relationship type that is already in use.

A relationship in EXO Business is a two-way relationship between two entities in the EXO Business system. For example, a relationship type may define the relationship between Contacts and the suppliers (Creditors) they work for. When viewing a Contact record and creating a relationship between it and a Creditor, this relationship type could be called “Works for”; when viewing a Creditor’s record and creating relationships between it and Contacts, the same relationship type could be called “Employs”.

Field	Description
Entity Source	<p>Select the first type of entity that the relationship type applies to. Choose from:</p> <ul style="list-style-type: none"> • Contact • Customer (i.e. Debtor) • Supplier (i.e. Creditor) • Non Account • Staff <p>For example, if the relation type defines the relationship between a Contact and a Creditor, select “Contact” here.</p>
Entity Destination	<p>Select the second type of entity that the relationship type applies to. For example, if the relation type defines the relationship between a Contact and a Creditor, select “Creditor” here.</p>

Rel. Name	Enter a name for this relationship type when viewed from Source to Destination. For example, if the relation type defines the relationship between a Contact and the Creditor that they work for, you could enter “Works for” here.
Inverse Rel. Name	Enter a name for this relationship type when viewed from Destination to Source. For example, if the relation type defines the relationship between a Contact and the Creditor that they work for, you could enter “Employs” here.
Category	Read-only field that displays the category that the relationship is grouped under. Displays “User Defined” for relationship types that are added manually.
Image	Select an icon image to appear next to relationships of this type on the Relationships tab, or click Default Image to use the default.

Creating Relationships between Entities

To create a relationship between EXO Business entities:

1. Go to the Relationships tab of the Debtors, Creditors, Non Accounts or Contacts window.
2. Right-click anywhere in the main window and choose **New**. The Relationship : New window is displayed:

3. Select the relationship type (see page 141) in the **Relationship Name** field.
4. Click the ellipsis button of the second **Entity Name** field, and search for and select the “target” entity.
5. Click **OK**.

Removing Relationships

To remove a relationship, right click on the relationship icon and select **Remove**.

Activities

Activities can be set up in EXO Business to provide reminders and progress indicators for important events. An activity can be a Task or an Appointment:

- A Task is a to-do item that must be completed in a specified time frame.
- An Appointment is an event scheduled for a specific time.

Activities can be accessed in multiple ways:

- Via the Activities tabs in the maintenance screens for Contacts, Debtors, Creditors and Non Accounts.
- Via the Activity Search widget, which can be added to the EXO Business business flow menu.
- Via the EXO Business CRM module.

When using the EXO Business CRM module, activities can be synchronised with Microsoft Outlook. Tasks are converted to Outlook Tasks and Appointments are converted to Outlook Appointments.

Creating an Activity

Click the **New Activity** (📅) toolbar button to create a new activity. Alternatively, right-click on the Activity Search widget's calendar in the time slot that you want to create the activity in.

The Activity Window

The screenshot shows the 'Activity - Prepare for meeting' window. The title bar includes standard window controls. The menu bar contains 'File'. The toolbar includes 'Save & Exit', 'Save & New', 'Cancel', 'Delete', 'Recurrence', and 'Mark Complete'. The 'Details' tab is selected, displaying the following fields:

- Activity Type: Appointment
- Type: New Business
- Sync with Outlook:
- Subject: Presentation
- Company: ALL CAR PARTS
- Phone: 09-476 1430
- Contact: Murray Shackland
- Phone: 09-476 1430
- Mobile: 025-421 9547
- Opportunity: (empty)
- Job Code: (empty)
- Campaign Wave: (empty)
- Label: Business
- Status: Not Started
- Assigned To: EXO BUSINESS ADMIN ACCOUNT
- Priority: Normal
- Assigned By: EXO BUSINESS ADMIN ACCOUNT
- % Complete: 0.00
- Start time: 03.04.2012
- End time: 03.04.2012
- All day event:
- Reminder: 15 minutes

Note: If [Extra Fields \(see page 23\)](#) have been set up for Activities, an Extra Fields tab will also be available on this window.

This is the window for entering new activities; use the table below as a reference for completing the fields in this window.

Field	Description
Activity Type	Select whether the activity is a Task or an Appointment.
Type	This is a user-definable classification for the activity. Select a type from the list, or select "Edit List..." to create a new type.
Sync with Outlook	If this box is ticked, the activity will be synchronised with Outlook whenever a sync is performed. If this box is not ticked, the activity will not be included in synchronisation operations.
Subject	Type a brief description of the activity and its purpose.
Company Contact	Assignment of an activity to a Company and/or Contact is optional. Where assigned, the activity will appear on the Activities tab of that company (Debtor, Creditor, Non Account) and/or the Contact screen. Note: When entering the Company name, use the search option by typing ? and pressing TAB.
Opportunity	This field is only available when the EXO Business CRM module is licensed. If the activity was created from an Opportunity, that Opportunity will be displayed here; otherwise, you can optionally specify an Opportunity to associate the activity with.
Job Code	This field is only available when the EXO Job Costing module is licensed. If the activity was created from a job, that job will be displayed here; otherwise, you can optionally specify a job to associate the activity with.
Campaign Wave	If the EXO Business CRM module is installed, activities can be associated with a campaign wave. Note: When creating an activity from the Details tab of the Campaigns window, the activity is associated with the first wave of that campaign. When creating an activity from the Waves tab, the activity is associated with the selected campaign wave.
Label	A label can be specified for the activity - this affects how it will appear on calendar displays.
Priority	A priority (Low, Normal or High) can be specified for the activity. Low and High priority tasks are indicated with an icon on calendar displays.
Status	The Status setting has predefined list entries, but these may be edited or added to using the "Edit List..." option. For Tasks, clicking the Mark Complete toolbar button automatically updates this property to "Completed".
Assigned To Assigned By	The EXO Business Staff members that the activity was assigned to and by.

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% Complete This property applies to Tasks only. Specify the percentage completion by entering a number or using the arrow controls.

Clicking the **Mark Complete** toolbar button automatically updates this property to 100%.

Start Time
End Time The start and end time for the activity.

All day event If this is selected, the selections for the time of day will disappear as they are no longer valid.

Reminder If you tick this checkbox, the system will pop up a reminder from the system tray after adding a reminder icon. Reminders can be enabled or disabled using the **Enable Reminders** option on the Tools menu of the Activity Search window/Dashboard widget.

Show time as This property applies to Appointments only. Select how to display the time for this activity on the Task Scheduler. Choose from:

- Free
- Tentative
- Busy
- Out of Office

Note: The relationship between the **Status** and **% Complete** properties is automatically maintained. For example, setting **Status** to “Completed” automatically updates the **% Complete** value to “100” and vice versa.

Once all properties are configured, click **Save & Exit** on the toolbar to save your changes and close the Activity window, or **Save & New** to save changes to this Activity and reset all fields so that a new Activity can be added.

Activity Recurrence

Click the **Recurrence** button to set an activity as recurring and establish the frequency.

Event recurrence

Event time
Start: 12:00 AM End: 12:00 AM Duration: 1 day

Recurrence pattern

Daily Recur every 1 week(s) on:

Weekly Sunday Monday Tuesday Wednesday

Monthly Thursday Friday Saturday

Yearly

Range of recurrence

Start: 19.09.2011

No end date

End after: 10 occurrences

End by: 21.11.2011

OK Cancel Remove recurrence

Configure the recurrence options and click **OK** to assign this to the new or edited task. If you are editing an existing task and no longer need this recurrence to continue, click **Remove recurrence** to remove this from the calendar.

Social Media

MYOB EXO Business can display social media information about companies (Debtors, Creditors and Non Accounts), Contacts and Opportunities. The following social media services are currently supported:

- Twitter
- Facebook
- LinkedIn

Users have the option of viewing social media information using their own login details, or using details for the company. For example, while users may use the company details by default, a salesperson may want to view an Opportunity's LinkedIn details while logged in to their own account, so that they can see any connections between themselves and the Opportunity. It is possible to switch between company and personal accounts at any time.

Setting up Social Media

Company-wide social media details are set up in EXO Business Config at **Admin > Social Media > Setup Social Media**. From this screen you can:

- Authorise social media applications using a company account
- Enter IDs for the company's social media accounts

MYOB EXO Configurator / B - Demo Mode

File Account Help

Company Essential Admin System Profiles Forms Staff Utilities

Business Admin

- › Courier
- › Period
- › Banks
- › Setup
- › General Ledger
- › EXO Finance
- › Creditors
- › Stock
- › Debtors
- › Sales
- › Inwards Goods
- › ClientConnect
- › Dashboards
- › EXO Fixed Assets
- › EXO Intercompany Consolidations
- › Serviceable Units
- › Analytics
- Social Media
 - Setup Social Media
 - Application Key/Secret

Save Cancel Facebook LinkedIn Twitter

Click on the buttons above to retrieve access tokens

Company Social IDs Company Social Preview

Facebook

User ID/Name:

Page ID/Name:

Campaigns to be sent from: Page User

My Company widget uses: Page User

LinkedIn

User ID:

Company ID:

Campaigns to be sent from: Company User

My Company widget uses: Company User

LinkedIn does not currently support 3rd party applications posting activity updates on behalf of companies.

Twitter

User ID/Screen Name:

Company ID/Screen Name:

Campaigns to be sent from: Company User

My Company widget uses: Company User

Twitter does not distinguish between Companies and Users hence both User and Company share the same Twitter ID.

Motopartz.co.nz Demo ExoAdmin

Note: The Social Media section in EXO Business Config also includes an **Application Key/Secret** section. This section contains details used by the EXO Business application to connect to social media networks. **Do not alter these details unless instructed to do so by MYOB; altering these details could cause the social media functions to stop working.**

Authorising Social Media Applications

To use the social media functionality, the EXO Business application must be authorised to log in to the various social networks. Users have the option of logging in and viewing social media information using their own accounts, or using a company account. To log in and authorise social media applications using a company account, click the toolbar buttons for each social media network:



Doing so retrieves an “access token”, which is stored and used to log users in using the company’s details.

Note: To change the company account in use, go to the Twitter, Facebook or LinkedIn website and log out, then come back to this screen in EXO Business Config. You will be prompted to log in again.

Setting up Company Social Media Accounts

The Company Social IDs sub-tab in the **Social Media > Setup Social Media** section contains social media account IDs or usernames for the company. The accounts entered here will be displayed by the social media widgets (see page 151) and used when posting to social media from a campaign wave (EXO Business CRM).

Facebook and LinkedIn distinguish between user accounts and accounts for pages or companies, which exist independently of an individual user. Extra settings are available to determine how to manage these. The following table describes all available settings:

Field	Description
Facebook	
User ID/Name	This read-only field is populated automatically when clicking the Facebook toolbar button.
Page ID/Name	If your company has its own Facebook page, enter its ID number or name here.
Campaigns to be sent from	When posting to social media from a campaign wave, you can post to the Facebook wall for the User ID or for the Page ID; use these options to select which wall to post to.
My Company widget uses	This setting determines what appears on the “My Company’s Facebook Wall” widget. Select whether to display the Facebook wall for the User ID or for the Page ID.
LinkedIn	
User ID	This read-only field is populated automatically when clicking the LinkedIn toolbar button.
Company ID	If your company has its own account on LinkedIn, enter its ID number here.
Campaigns to be sent from	These options are disabled; at present, LinkedIn does not allow third party applications such as EXO Business to post activity to a company account, so the User option must always be selected.

My Company widget uses This setting determines what appears on the “My Company’s LinkedIn Activity” widget. Select whether to show LinkedIn activity for the User ID or the Company ID.

Twitter

Company ID/Screen Name This field is populated automatically when clicking the **Twitter** toolbar button; it can also be entered and edited manually.

This is the Twitter account ID that will be displayed on the “My Company’s Twitter Mentions” widget. When posting to social media from a campaign wave, the post will be sent to this account’s Twitter feed.

Note: Twitter does not distinguish between users and companies, so all other Twitter properties are disabled. The **User ID/Screen Name** is read-only, and is automatically populated with whatever is entered for the **Company ID/Screen Name**.

Once you have set up these options, you can go to the Company Social Preview sub-tab see how the selected accounts will appear on the social media widgets.

Setting up Personal Social Media Logons

Users can log on to social media networks using their personal account details on the Social tab (see page 149). If the user has not specified a personal account, they will be prompted to log in and authorise the social media applications the first time they go to a sub-tab on the Social tab. The details they enter are saved against their Staff record in the EXO Business database.

Setting up Social Media IDs

Social media usernames or account IDs can be set up for companies and Contacts in the following places:

- On the Details 2 tab of the Debtor Account Details window (see page 94).
- On the Details 2 tab of the Creditor Account Details window (see page 108).
- On the Details tab of the Non Account Details window (see page 114).
- On the Details tab of the Contacts window (see page 120).

Opportunities use the social media details set up for the company that they are associated with.

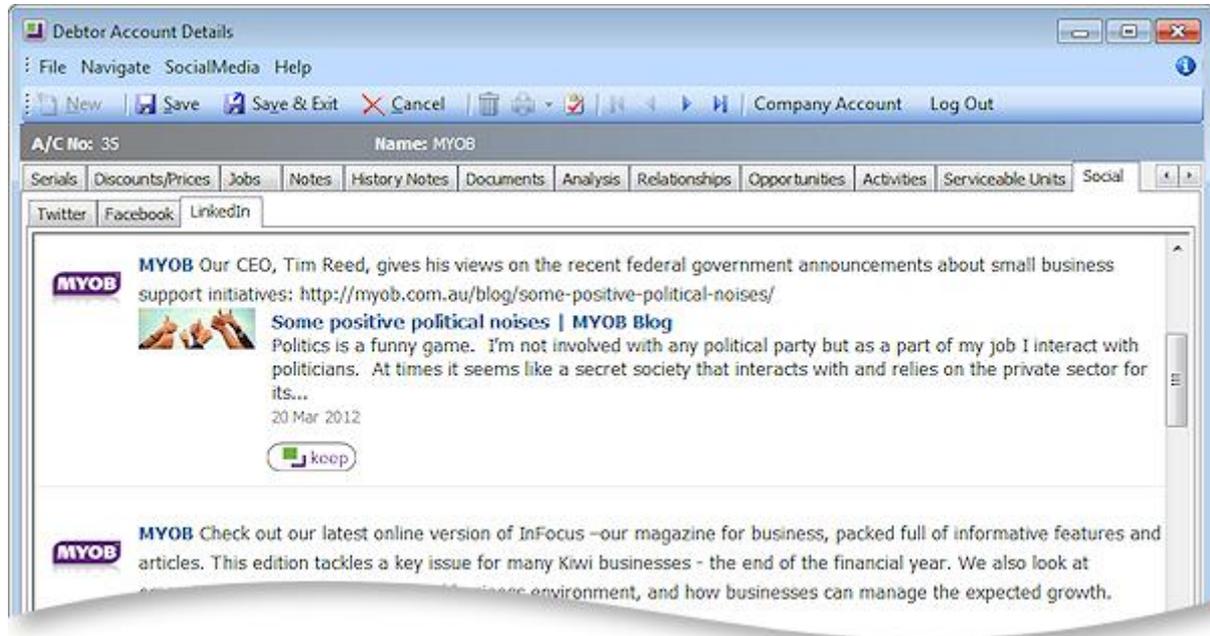
If you do not know social media details for a company or Contact, they can be searched for and filled in automatically from the Social tab (see page 149).

Note: The LinkedIn ID must be the numerical ID, not a username. The Facebook ID can be a numerical ID or a Facebook username, if one has been set up.

The Social Tab

Social media information is displayed on the Social tab, which is available on the Debtor, Creditor, Non Account, Opportunity and Contact screens.

Note: The **Disable Social Media Tabs** profile setting can be used to hide this tab on some or all of these screens.



If no details have been entered social media account details for the company/Contact/Opportunity being viewed, each sub-tab displays the results of a search for the company/Contact/Opportunity's name. Each search result has a **keep** button next to it; clicking this button populates the company/Contact/Opportunity's social media details with the details from that search result. (EXO Business captures as many details as it can; for example, LinkedIn search results may also specify a website and a Twitter feed - these details will be copied as well if they are not already present.)

Once account details have been entered or found, the following social media information is displayed:

- Twitter - The company/Contact/Opportunity's Twitter feed.
- Facebook - The contents of the company/Contact/Opportunity's Facebook wall.
- LinkedIn - All of the company/Contact/Opportunity's activity on LinkedIn.
- LinkedIn Connections - All of the company's employees, sorted by degree of connection to the logged in user.

Note: The LinkedIn Connections tab is available for Opportunities only.

Each sub-tab has a **More Results** link at the bottom. Clicking this button opens a separate browser window to display the company's Twitter feed, Facebook wall or LinkedIn page.

On all sub-tabs, each entry has a **keep** button. Clicking this button copies the entry to the company/Contact/Opportunity's History Notes tab (see page 137).

Company vs. Personal Account

On the Facebook and LinkedIn sub-tabs, buttons are available to switch between the user's personal account and the company account:

- **Your Account** - when using the company account, this button switches to using the personal account.
- **Company Account** - when using the personal account, this button switches to using the company account.
- **Log Off** - when using the personal account, this button logs off the personal account.

If the user has not specified a personal account, they will be prompted to log on the first time they go to a sub-tab on the Social tab. The details they enter will be saved against their Staff record in the EXO Business database.

Social Media Widgets

The following widgets are available to display social information about your own company on dashboard displays (see page 539):

- My Company's Facebook Wall
- My Company's LinkedIn Activity
- My Company's Twitter Mentions

These widgets use the account IDs entered in EXO Business Config; if no details have been entered, these widgets perform a search for the Company Name as set up in **EXO Business Config > Company > Company Details**.

Working with Stock

Stock Overview

The Stock function in MYOB EXO Business is indispensable to the operation of the system because it represents the only available link between the Sales (Debtors) Ledger and the General Ledger. All products and services commonly supplied as part of the day-to-day business must have an appropriate code set up in this ledger. This applies to physical stock items as well as services provided. It is therefore common practice to have a number of miscellaneous stock codes (probably one for each product group) to accommodate any infrequent sales transactions such as the sale of an asset or the renting of property. This principle has proven to work well in practice for two reasons:

1. You can take advantage of a large number of reports and graphical representations for all revenue-generating activities.
2. It shields the non-accounting sales data entry operator from more complex decisions required for General Ledger posting.

The topics in this section detail options for maintaining records of the goods and services you offer for sale. This includes:

- descriptive information (see page 161)
- cost and selling prices (see page 160)
- physical stock levels (see page 178)
- supplier sources
- pictures of your products.

It explains how you can categorise or group your products for your product catalogue, customer price lists and for sales analysis purposes. Also included in this section are the various methods of recording and reporting the movement of stock into, within, and out of your company.

Stock Master

Accounts > Stock

The stock master holds the inventory items, and their pertinent details.

The screenshot shows the 'Stock Item Details' window for stock code AIRFIL01 and description OVALCHROME AIR FILTER. The window is divided into several sections:

- Details 1:** Contains the stock code (AIRFIL01), description (OVALCHROME AIR FILTER), and various dropdown menus for Groups (Stock group (Fine): ENGINE, Stock Group (Coarse): NO GROUP SELECTED, Classification: NORMAL, Price group: NOT ASSIGNED).
- Cost Prices:** A table showing prices for Supplier (AUD): \$39.99, Last: \$49.99, Average: \$49.99, and Standard: \$49.99.
- Sell Prices:** A table listing prices for different regions: 1. Internet: \$62.04, 2. Retail: \$68.24, 3. Trade: \$61.42, 4. UK: \$21.84, 5. US: \$30.71, 6. Fiji: \$64.83, 7. Australia: \$54.59, 8. Singapore: \$53.53, 9. ComputedSellPrice: \$54.99, 11. Price 11: \$0.00.
- Other:** Includes Main supplier (8. AUSSIE CAR PARTS), Unit/Pack (EACH), Link stockcode, and Serial no. tracked (Not Serialised (No)).
- Flags:** A list of checkboxes for Active, Lookup, Recoverable, Discountable, Restricted Goods, Batch tracked, and Item expires.
- Stock Levels Table:** A table showing physical stock, not for sale, committed, back order, incoming, and free stock across five locations.

No.	Stock Location	Physical	Not for sale	Committed	Back Order	Incoming	Free Stock
1	Auckland	11	0	1	0	0	10
2	Wellington	6	0	0	0	10	16
3	Christchurch	1	0	0	0	0	1
4	Sydney	5	0	0	0	10	15
5	WIP	5	0	0	0	0	5
		28	0	1	0	20	47

Details 1 (see page 161) – contains stock item code, description, groups, cost and sell prices, unit of measure, serial no. tracking method and stock levels per stock location.

Details 2 (see page 164) – holds the min/max stock, sales, purchase and COS GL codes, weight and cubic info, sales and purchase GST and the barcode and alternate codes.

Extra Fields (see page 135) – only available if extra fields have been set up (see page 23).

Transactions (see page 167) – contains a list of transactions for the particular stock item, e.g. invoices, orders, receipts, adjustments, and transfers.

Orders (see page 169) – displays the orders related to the stock item. It contains three panels: sales orders, transfer requests and purchase orders.

Jobs (see page 173) – displays any jobs that the stock item is currently being used in. This tab is only available if EXO Job Costing is installed.

Works Orders (see page 173) – displays Works Orders (see page 515) associated with the stock item. This tab is divided into two panels: works orders to be produced and works orders to be used in production.

Web (see page 174) – contains fields that you need to use if you are displaying your stock on a website.

Batch Qty (see page 175) – only available if the enable stock batch codes have been enabled. This tab is used to assist in handling batch-tracked stock items

Notes (see page 137) – allows entry of 'free-form' notes pertinent to the stock item.

History Notes (see page 137) – this is like the Notes tab, but is more structured. This makes it easier to search for previous notes related to the stock item. It’s also easy to create, delete, or email history notes.

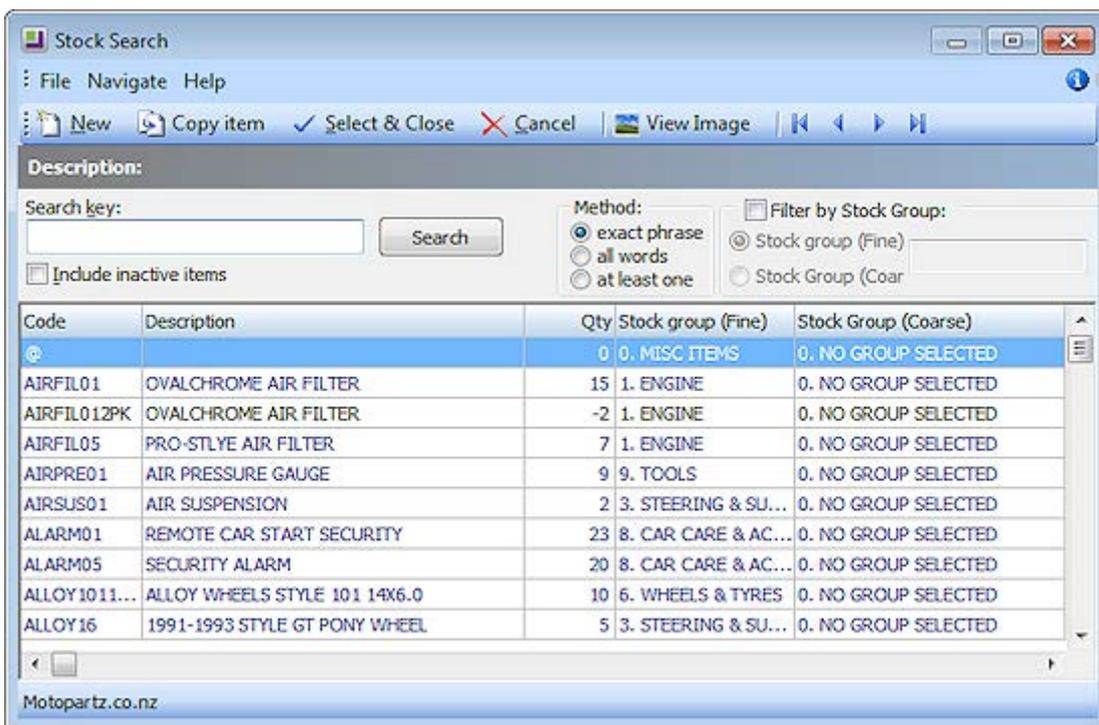
Documents (see page 140) – lists all the documents related to a stock item. It could be a word processing document, a graphical .gif or .avi file, or any document that is recognized by a Windows application.

Analysis (see page 175) – a quick preview of the sales status of the stock item. The graph displays the dollar value (depicted through a red line). Double-click on the graph to view the total units sold (blue line).

Note: The toolbar icons at the top of the stock item window change when moving between tabs.

Stock Search

The Stock Search screen is used to select a Stock item for use in a document, e.g. a Sales Order or a Purchase Order. It is usually accessed by entering “?” into the code column of a new line and pressing TAB.



Note: Any variables entered into the search key field will only search the Code and Description columns of the grid.

Enter text to search by into the Search field, set any required filters and click **Search**.

Choose the appropriate item from the list and click the **Select & Close** button, or double-click the item to add it to the document.

Field Descriptions

Field	Description
Search Key	Enter the search name phrase or part name here.
Include inactive items	Check this box is the search result is to include inactive items in the search result.
Method	<p>Choose one of these options to refine the search.</p> <ul style="list-style-type: none"> • exact phrase: The search result must contain the words exactly as they are entered in the search key field. • all words: The search result will contain all of the words or part words entered in the search key field. • at least one: The search result will contain at least one of the words or part words entered in the search key field.
Stock grouping	
Filter by stock group	Check this checkbox to enable the stock group options.
Stock group fine	Choose this radio button if you want to restrict the search results to the fine stock group relative to the variable entered into the Stock Group field.
Stock group course	Choose this radio button if you want to restrict the search results to the course stock group relative to the variable entered into the Stock Group field.
Search results grid	
Code	The stock code
Description	The stock description for the stock item.
Qty	The physical stock level at the current location.
Stock Group (Fine)	Formerly designated Primary this is a stock group from those established in Business Admin > Stock Groups .
Stock Group (Course)	Formerly designated Secondary this is a stock group from those established in Business Admin > Stock Groups .
Popup Menu	Right clicking anywhere in the search results grid opens a popup menu with a Stock Level option. Clicking this opens the Stock level Enquiry window which lists the physical, free, not for sale, committed and back order stock levels for the defined regions.

Setting up Stock Groups

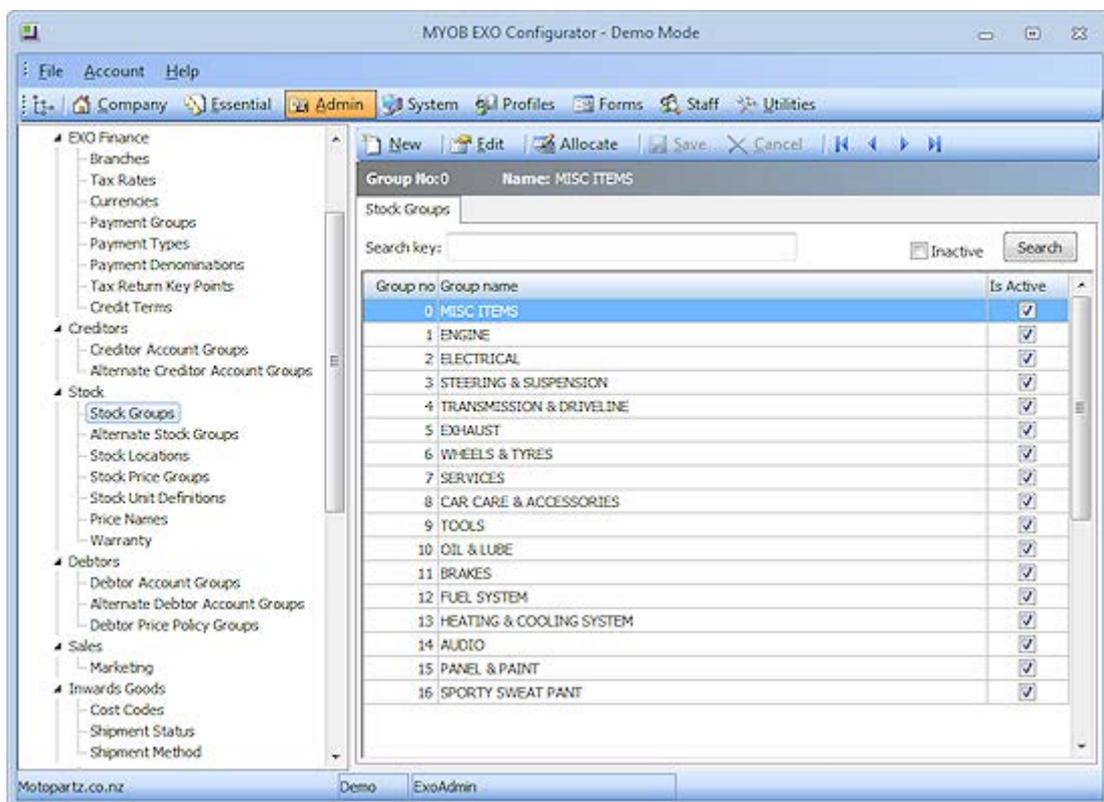
Setting up Stock Groups

MYOB EXO Business has a single product classification – you may add any number of additional categories through Extra Fields options, but reporting needs to be customized to incorporate these additional groupings. This topic details the procedure for setting up Stock Groups. Products and services can be organised into stock groups.

Each Stock Group has an option to set up expected margin, together with an allowable variance from this expected margin. The variance below indicates that a Margin of 40% Plus or Minus 5% is acceptable, that is 35% through 45% inclusive. These can be preset via Stock Groups as illustrated below.

To set up a Stock Group:

1. Select **Stock > Stock Groups** from the Admin menu in EXO Business Config. The Stock Groups window is displayed:



2. Click **New** to add a new group. The **Details** tab is displayed:

The screenshot shows a 'Details' tab with the following fields and sections:

- Stock group number:** A text input field with a green checkmark and the word 'Active' to its right.
- Stock group name:** A text input field.
- Parent group:** A dropdown menu.
- Report code:** A text input field.
- Web Site:** A section containing a checkbox for 'Display on website' and a text input field for 'Web site picture'.
- One-Off Stock Item Codes:** A section containing text input fields for 'Autocode prefix' and 'Autocode suffix', with 'e.g:' to the right of the suffix field.
- Profit:** A section containing text input fields for 'Expected margin' and 'Margin variance +/-'.
- Ledger Posting Profile:** A section containing three rows, each with a text input field and a small icon to its right:
 - Sales GL code: 01000-00
 - Cost of sales GL code: 02050-00
 - Purch Clearing GL Code: 05550-00

Field Definitions

The fields on this tab are detailed in the table below:

Field	Description
Stock group number	The number assigned to this group.
Stock group name	Enter a name for this group
Parent group	Select a parent group from the drop-down list.
Report Code	Enter the report code here.
Display on website	A check in the box if you want to display the stock on your web site, under this group.
Website picture	The path and file name of a .gif or .jpg file of a picture, if you want it to be displayed on your web site as a heading for products in this group.
Autocode prefix	Enter an Autocode Prefix , and a numeric Autocode Suffix that will increment on stock code generation. Autocode generator values against each product group.
Autocode suffix	
Expected margin	Used to set up an expected margin, together with an allowable variance from this expected margin. I.e. a margin of 40% with an acceptable 5% variance is 35% through 45% inclusive.
Margin variance +/-	

Sales GL code Select the Sales and Cost GL codes using the General Ledger Account search window.

Cost of sale GL code

Purch clearing GL code The General Ledger Account code that purchase transactions for this stock are posted to.

About Stock Price Groups

Stock Price Groups allow you to collect similar products together that may share common pricing but are distinct products. Example whiteboard markers are stocked and sold in different colours but are all the same price, any discount policies that refer to them refer to every colour in the range. Using Stock price Groups you need only change the policies relating to the group and not every individual colour.

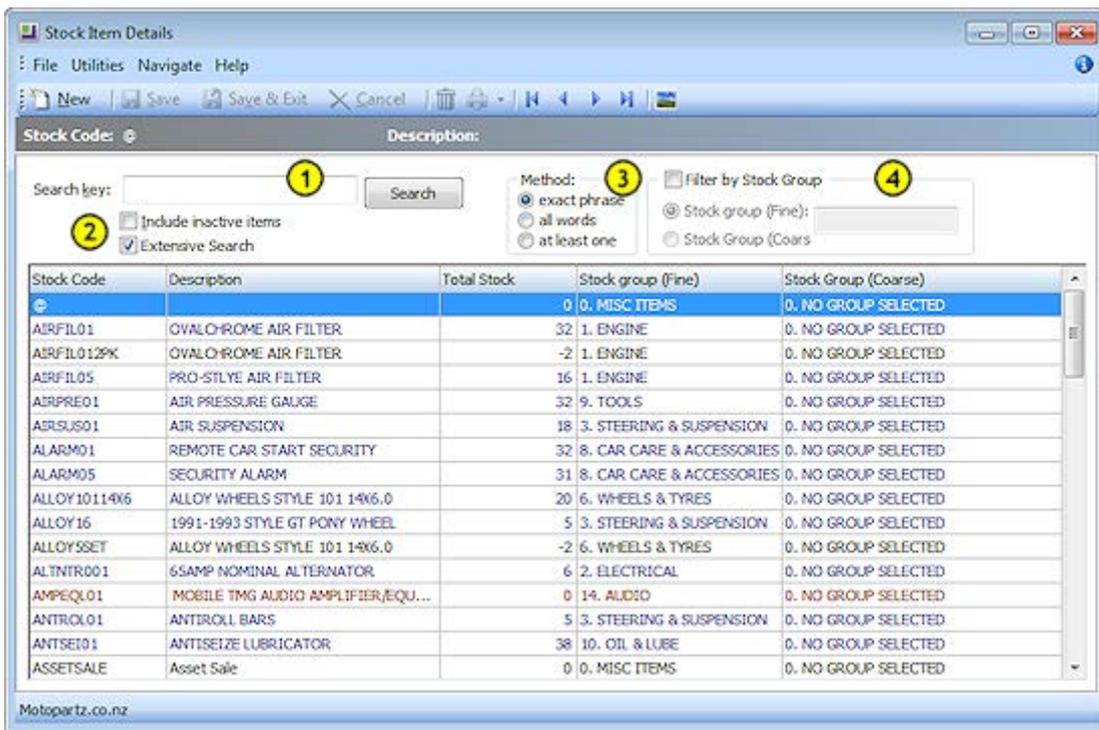
Stock Price Groups are set up in MYOB EXO Business Config at **Admin > Stock > Stock Price Groups**.

Setting up Stock Item Details

Account > Stock

You can set up the stock items through the Stock Item Details window. The window contains a set of tabs that allow you to easily record and access stock details when you require it.

To set up stock, select **Stock** from the Account menu. The Stock Item Details (search) window is displayed:



This is the initial stock interface. Stock items can be found through the search options at the top of the window, or a new stock item can be added by clicking the **New** icon. However, it's best to search for the item first to avoid double entry. A basic method for searching is detailed below, however, we recommend reviewing the advanced search options (see page 154).

1. Enter the search name, phrase or part name here.
2. Search Options:

- Check **Include inactive items** to enable inactive Stock items (i.e. items whose **Active** flag is unticked) to appear in search results.
 - Check **Extensive Search** to enable powerful searching when barcodes used as stock items. This is aimed at businesses that use the barcode as the stock item number, and makes searching faster and more effective. This is enabled by default.
3. Select the Method. Choose one of these options to refine the search:
- **exact phrase:** The search result must contain the words exactly as they are entered in the search key field.
 - **all words:** The search result will contain all of the words or part words entered in the search key field.
 - **at least one:** The search result will contain at least one of the words or part words entered in the search key field.
4. Check the checkbox to enable the radio button within. Choose the fine radio button if you want to restrict the search results to the fine stock group relative to the variable entered into the Stock Group field. Choosing the course button works in the same manner, restricting the results to course group.

The grid header fields are detailed in the table below:

Field	Description
Code	The code you use to call up an item. A stock code can normally contain up to 15 characters.
Description	The name or description of the stock item as it should appear on invoices or reports. The description can contain up to 40 characters which can be overtyped in the Invoice Entry, Sales Orders and Purchase Orders windows.
Qty	The physical stock level at the current location.
Stock Group (Fine)	This is more of a specific stock group.
Stock Group (Coarse)	This is more of a generalised stock group.

Right-clicking on a Stock item opens a popup menu with a single item: **View Image**. If there is an image associated with this Stock item (see page 174), it can be viewed by selecting this option.

Once the search fields have been defined and the stock searched with no result, begin creating the new Stock Item by clicking **New**. The Stock Item Details window (see page 152) appears - to begin with only the following tabs are available:

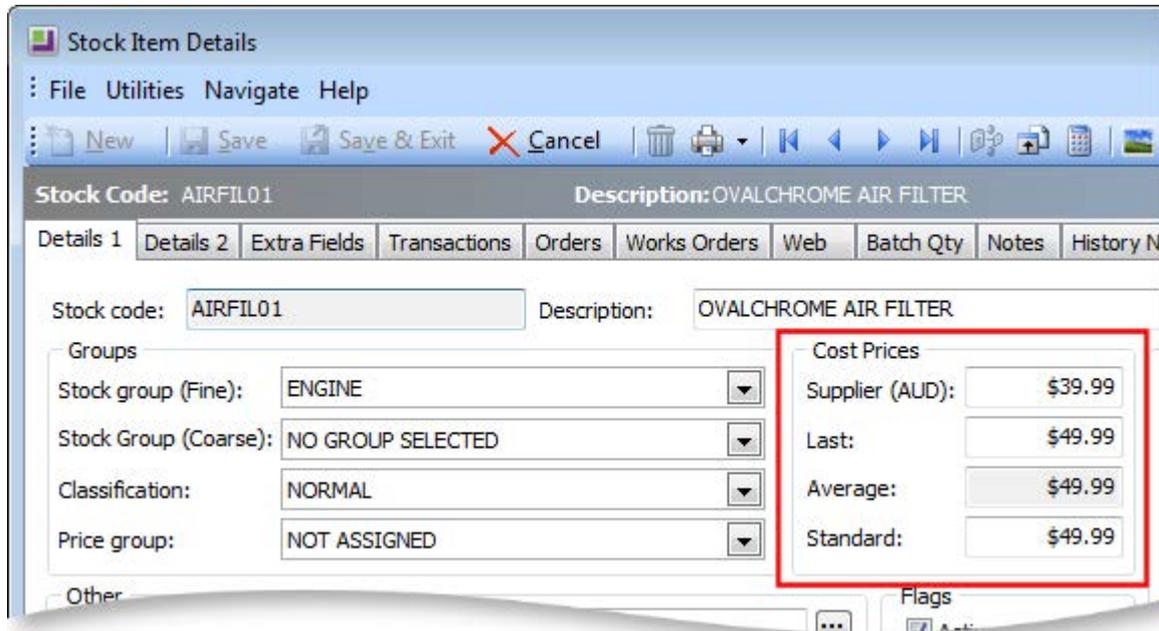
- Details 1 (see page 161)
- Details 2 (see page 164)
- Extra Fields (see page 135)

Once you have entered details on these tabs, click **Save**. All other tabs then become available.

Setting Cost Methods and Sell Prices

Prices set for stock items vary depending on the outlet – retail, wholesale or trade. If the item is being sold through a website there may be a different price for it. You may also choose to set special prices for some customers and discounts for certain stock items. Each customer can have a default base price on which discounts operate. These prices can be represented in any currency.

Cost Prices



Field definitions

The fields in this window are detailed in the table below:

Field	Description
Supplier Cost	The default supplier published cost price used for purchase orders. This price is displayed in the main supplier’s currency.
Last	The current cost price for the stock item inclusive of landing charges.
Average	The weighted average cost or the average FIFO cost dependent on the option in MYOB EXO Business Config > Essential > General Settings > Stock Cost Method . The cost includes or excludes GST based on your creditor account setup. Including GST is not a usual option and is not recommended.
Standard	The manually adjusted cost price. This is the standard cost of this stock item.

Sell Prices

The sell prices that you see in the Sell Prices panel on the Details 1 tab of the Stock Item Details window (see page 161) are those you set in **EXO Business Config > Admin > Stock > Price Names**.

Note: See the White Paper “Discount Policies” for more information on Discounts and Special Prices. This White Paper is available on the MYOB EXO Business partner site (login required).

Entering Stock Details

Account > Stock > [Search] > {double click on a Stock item}

The main details – input and display – are set on two tabs on the Stock Item Details screen (Details 1 and Details 2). This allows the Stock Lookup to maintain a small floating window and not obscure other relevant information that you are entering. Together, the two tabs allow you to store reference information such as the stock code with its description, stock locations, codes, stock quantities and the various selling prices.

The note after this procedure provides more information on these features.

To enter stock details:

1. Click the **Details 1** tab in the **Stock Item Details** window. This is the default tab that is displayed when you double-click a stock item from the Stock Item Details (search) screen. The following window is displayed.

No.	Stock Location	Physical	Not for sale	Committed	Back Order	Incoming	Free Stock
1	Auckland	11	0	1	0	0	10
2	Wellington	6	0	0	0	10	16
3	Christchurch	1	0	0	0	0	1
4	Sydney	5	0	0	0	10	15
5	WIP	5	0	0	0	0	5
		28	0	1	0	20	47

MYOB EXO Business User Guide

- Complete the entry fields on the screen. The following table provides information on the fields under this tab:

Field	Description
Stock Code	The code you use to call up an item. A stock code can normally contain up to 15 characters.
Description	The name or description of the stock item as it should appear on invoices or reports. The description can contain up to 40 characters which can be overtyped in the Invoice Entry, Sales Orders and Purchase Orders screens.
Groups - The group options are all selected from predefined drop down menus.	
Stock Group (Fine)	Formerly designated Primary this is a stock group from those established in Business Admin > Stock Groups .
Stock Group (Course)	Formerly designated Secondary this is a stock group from those established in Business Admin > Stock Groups .
Classification	A selection from the list of stock classifications. These are predefined. They can be used for selective reporting in Clarity.
Price group	The name of the price group.
Cost Prices - these are detailed in Setting Cost Methods and Sell Prices (see page 160)	
Supplier Cost (NZD)	The default supplier published cost price used for purchase orders. This price is displayed in the main supplier's currency.
Last	The current cost price for the stock item inclusive of landing charges.
Average	The weighted average cost or the average FIFO cost dependent on the option in MYOB EXO Business Config at Essential > General Settings > Stock Cost Method . The cost includes or excludes GST based on your creditor account setup. Including GST is not a usual option and is not recommended.
Standard	The standard cost of this stock item.
Sell Prices	
Internet Retail Trade	The Price Names that you set up in MYOB EXO Business Config at Admin > Stock > Price Names . Note: MYOB EXO Business supports a maximum of 100 sell prices.
Pack Of	The stock code entered in the Pack of field on the Details 2 page.

Other	
Main Supplier	The name of the main supplier (see page 176) as defined in the Creditors Account.
Unit / Pack	Select the unit of sale for pricing, for example Per Pack, Per Box or Per Dozen. Unit options are set up in EXO Business Config at Admin > Stock Stock Unit Definitions .
Link stockcode	If this stock item is linked to another, e.g. if this item represents a pack of other items, the linked item's stock code is displayed here. This field is read-only - its value is set using the Link stockcode field on the Details 2 tab (see page 164).
Serial no. tracked	Select Yes if you want to track serial numbers for this stock item (see page 199). This check box is available if you have selected Track Serial Numbers in MYOB EXO Business Config > Profiles . Note: If checked, you are asked to enter the serial number for each unit of this item before you process a transaction such as Sales Order, Invoice or Purchase Order.
Flags	
Active	Select this flag if you want to see the stock item in the main search screen. This flag is checked by default.
Lookup	Select this option for a non-stock item (such as labour charges) or a physical stock item that does not require tracking of the in-stock quantities. Note: This flag is disabled and cannot be changed once transactions have been recorded against the stock item.
Recoverable	This flag is only available if EXO Job Costing is installed, and is disabled unless the item is a lookup item. If ticked, it designates the stock item as a recoverable expense for EXO Job Costing.
Discountable	You can clear this flag to exclude stock item from discounting price rules even though the rule encompasses the product group or price group that the stock item is in. This only applies on price rules with discounts and not on substitute price.
Restricted Goods	Customers can be prevented from buying restricted stock through the restricted stock feature. You can also change the caption for restricted item using the Display Name. Note: You can enable the Use customised customer stock restrictions logic Company-level profile setting to customise and extend the Restricted Goods function. When this setting is enabled, EXO Business uses the FN_RESTRICTED_ITEM function to determine if a Stock item can be sold to a Debtor - this function can be customised to suit the needs of your organisation.

Batch Tracked To batch-track a stock item, you need to set the item to batch tracked in the Stock Item Details window. The **Enable stock batch codes** profile setting must be enabled for this flag to be available.

Item Expires This flag is only available if the **Use expiry dates for batched and serialised items** profile setting is enabled. It adds support for expiry dates on batch or serial number records.

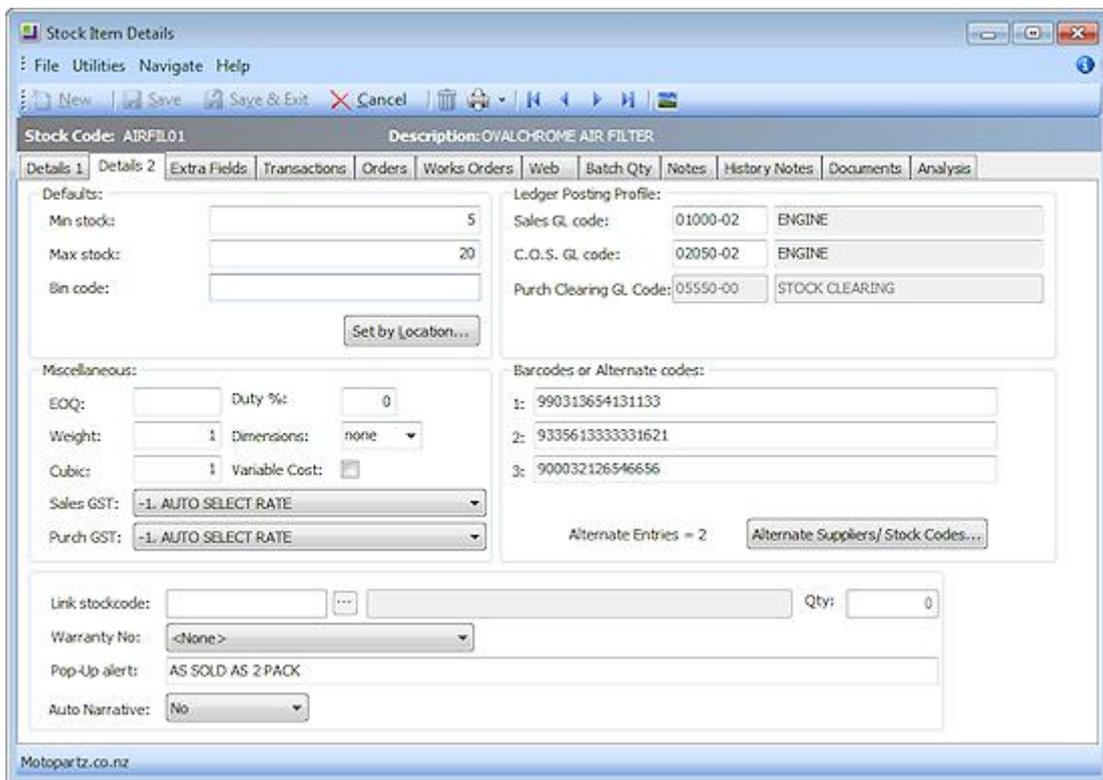
An **Expiry Days** field is displayed on the Details 2 tab of the Stock Item Details window (see page 164). Enter the number of days before expiry of the stock item here.

Stock Details 2 Tab

Account > Stock > [Search] > {double click on a Stock item} > (Details 2)

Once the information has been entered into the Details 1 tab (see page 161), the details in this tab need to be completed:

1. Click on the Details 2 tab.



2. Complete the entry fields on the window. The following table provides information on the fields under this tab:

Field	Description
Defaults	
Min Stock	A figure that indicates the default minimum stock level for the stock item for each location. When stock reaches this point, reordering is required.
Max Stock	A figure that indicates the maximum stock level for the stock item. This is the level to which reordered stock is to be raised.
Bin Code	The Bin or Shelf code used when picking a stock item.
Ledger Posting Profile	
Sales GL code	<p>The default code that sales transactions for this stock item are posted to. This must be a Profit & Loss account, and cannot be a GL Control Account.</p> <p>The default setting here is the Default Sales Account as set in the MYOB EXO Business Config > Admin > General Ledger > GL Control Accounts.</p>
Purchase GL code	<p>The General Ledger Account code that purchase transactions for this stock are posted to. This must be a Profit & Loss account, and cannot be a GL Control Account. This property is only available if the Lookup property on the Details 1 tab is selected.</p> <p>The default setting here is the Default Purch Account as set in MYOB EXO Business Config > Admin > General Ledger > GL Control Accounts. The post method depends on the Cost of Sales Method that you select in MYOB EXO Business Config > Essential > General Ledger.</p>
Purch Clearing GL Code	This property is only available if the Lookup property on the Details 1 tab is not selected. It cannot be edited, and defaults to the Stock Clearing Account as set in the MYOB EXO Business Config > Admin > General Ledger > GL Control Account .
C.O.S. GL code	<p>The Cost of Sales account in the General Ledger when stock is sold. This must be a Profit & Loss account, and cannot be a GL Control Account. This property is only available if the Lookup property on the Details 1 tab is not selected.</p> <p>This setting is used if "Post Cost of Sales A/c from Stock Item" is selected for the Cost of sales method at MYOB EXO Business Config > Essential > General Ledger.</p> <p>The default setting here is the Cost of Sales Account as set in the MYOB EXO Business Config > Admin > General Ledger > GL Control Accounts.</p>
Miscellaneous	
EOQ	Economic Order Quantity - allows you to set a minimum quantity to be ordered. The EOQ is enforced as per the EOQ prompt on purchase orders Company-level profile setting (Prompt, Force or No EOQ).
Weight	The physical weight of the stock item. This information need not be entered but is useful if you need to know the weight of items that are being couriered.

Cubic	The cubic weight of the item. This information need not be entered but is useful if you need to know the volume of items that are being couriered.
Duty %	Duty can be entered using automatic calculation of duty based on pre-set percentage held on the Stock Item. This can be used in the Inwards Goods – Cost Goods screen (see page 346), where you can choose to use the Duty Percent in the calculation of Landed Cost, by checking the Use stk duty % checkbox, then clicking Calculate .
Dimensions	Choose the dimension for this stock item if applicable. You can specify one, two or three measurements for a stock item – length, square, or cubic – and then buy or sell the item by these physical dimensions. Examples of how this could be used might include selling timber/material/carpet etc. by length or length and width.
Variable Cost	Tick this option to signify that the Stock item is a Variable Cost Item. This is an item where the cost price varies for each instance, to the point that the average cost is misrepresentative, e.g. freight by weight. If this option is ticked, the invoice line cost for the item is recorded as a percentage of the selling price on the invoice line. The percentage used is the expected GP% on the product group for this item.
Sales GST	The sale GST rates on stock items.
Purch GST	The purchase GST rates on stock items.
Barcodes or Alternate Codes	
Pack of	The stock code related to this pack. This can only be used on a Lookup item. It points at a stocked (non-lookup) item which will maintain the actual stock. The quantity of the stock item units contained in this pack is also specified.
Alternate Suppliers/ Stock Codes	Click this button to specify alternate suppliers for the stock item (see page 177).
Link stockcode	
Link stockcode	Lets you link this stock item to another - any transactions posted for this item are automatically posted to the stockcode you enter in this field. To specify a linked stockcode, this stock item must be set as a lookup item on the Details 1 tab (see page 161). For example, if you sell bottles in crates of six, you may have a “Bottle” stock item and a “Crate of Six Bottles” item - in this case, enter the Bottle item’s stock code into the Link stockcode field for the Crate of Six Bottles item. This means that whenever a crate is sold, the transaction is recorded against the Bottle stock item as well.
Description	The description for the linked stock item is displayed here.

Qty	The quantity of the linked stock item that this items represents. For example, if the stock item is for a crate of six bottles, enter the Bottle item’s stock code into the Link stockcode field and enter “6” into this field.
Warranty No.	Default warranty for the stock item.
Pop-Up alert	A note that you would like to appear when you sell or receive this item. For example: 2 ‘AA Batteries’ required. Note: Use the ^ character to insert a carriage return.
Auto Narrative	A stock note can represent a long description and can be customised for a particular line. Note copying can be automated for individual products by setting this field to “Yes”.
Expiry Days	If the profile Use expiry dates for batched & serial numbers is enabled, the system will offer and expect expiry dates to be entered on serial records if the Item Expires flag is checked on the Details 1 tab of the Stock Item (see page 161). Enter the number of days before expiry of the stock item here.

Viewing Stock Transactions

Account > Stock > [Search] > {double click on a Stock item} > (Transactions)

The transactions tab contains a list of transactions for a particular stock item. Transactions can be of different types and include the following:

- Creditors Invoice
- Debtors Invoice
- Sales Order
- Purchase Order
- Stock Receipt
- Manual Adjustment
- Stocktake Var Adjustment
- Stock Transfer
- Edited Invoice